



The Global Leader
in Rideshare Data

The Road Ahead:

Pricing Insights On Waymo, Uber and Lyft

June 2025



rideobi.com

TABLE OF CONTENTS

02

EXECUTIVE SUMMARY

04

PRICING

11

ETA

15

PRICE ELASTICITY AND ETA

17

SURVEY DATA: ATTITUDES ON AUTONOMOUS VEHICLES

25

METHODOLOGY

Obi is a global real-time aggregator that compares millions of pricing and pick-up (ETA) data points providing consumers and businesses with actionable data. The free consumer app allows riders to compare taxis, black cars and major rideshare providers instantly. Riders can search by car type, or pick up ETA and always book the lowest priced vehicle or quickest pickup. With over 1,000,000 global users, Obi has partnered with dozens of

rideshare and taxi providers around the world to help provide transparency in ride fares. The app provides real-time pricing data across all the major rideshares including Uber, Lyft, Waymo, Bolt, Curb, Indrive, Yango, Ola, Didi, Careem, Freenow, Grab and many more. Obi is available as a free download for iOS and Android.

More information on the app is available at rideobi.com.

Executive Summary

Welcome to the age of autonomous, where a taxi with no driver can pull up to a street corner, remind you to buckle up, and drive you smoothly to your destination. While headlines of driverless cars have graced the pages of tech news for the last decade, the last twelve months have shown just how compelling and game-shifting the future looks.

It's hard to turn a street corner in San Francisco without seeing Waymo's smooth cars with their round taxi light on the roof driving along the roads. Consumer adoption is enthusiastic. Waymo is growing market share, with consumers saying they prefer the experience to traditional rideshare or taxis.

A key feature of Waymo, unlike when Uber and Lyft entered the market, is that it's entered the market with premium pricing. Driverless doesn't mean a cheaper ride. Obi, using our Intelligent Pricing API, has run an in-depth hour-by-hour one month analysis of rideshare data from Waymo, Lyft Standard and UberX services selected across San Francisco roads between March 25, 2025 to April 25, 2025. A total of 88,998 raw data points (rideshare offer records) were extracted from our database. After grouping and filtering (see Methodology for details), this was transformed into 705 unique comparison points, each representing a standardized search instance for which all three major providers—Waymo, Lyft Standard, and UberX—were concurrently available and offered a fare quote and ETA.

The resulting report is the first in-depth examination of Waymo's pricing strategy.

In addition, our Obi Autonomous Ride Survey 2025 gathered viewpoints from 507 consumers in San Francisco, Los Angeles and Phoenix where autonomous vehicles are present. The survey provides unique insights and perspectives into consumer adoption, trust and attitudes towards autonomous vehicles.

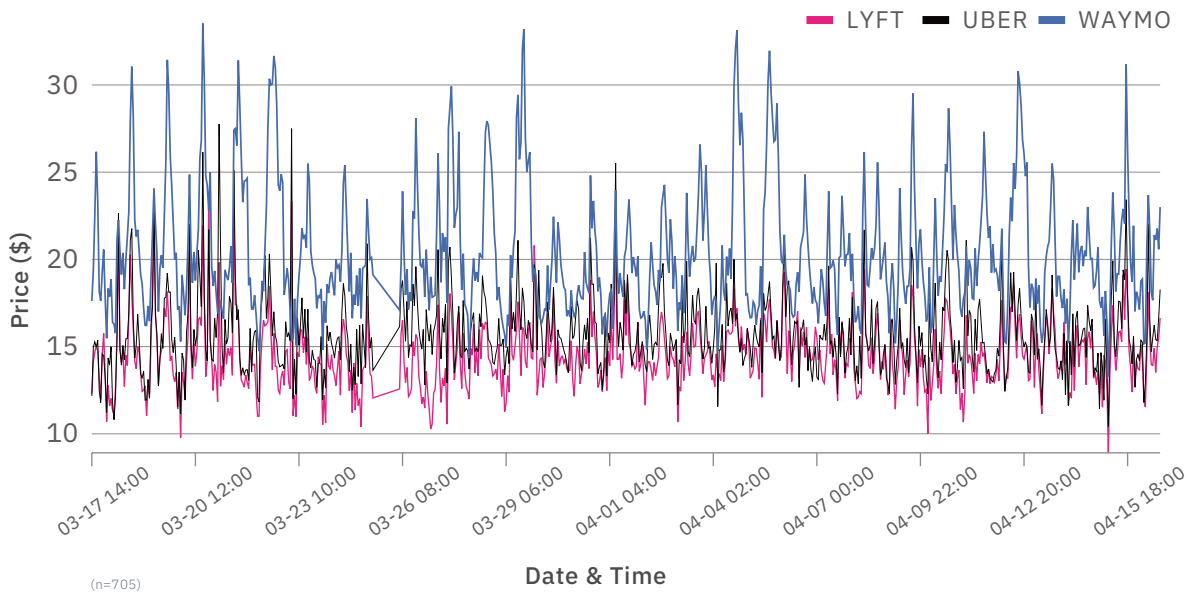
SECTION 1

Pricing

Consumers are paying more to ride Waymo.

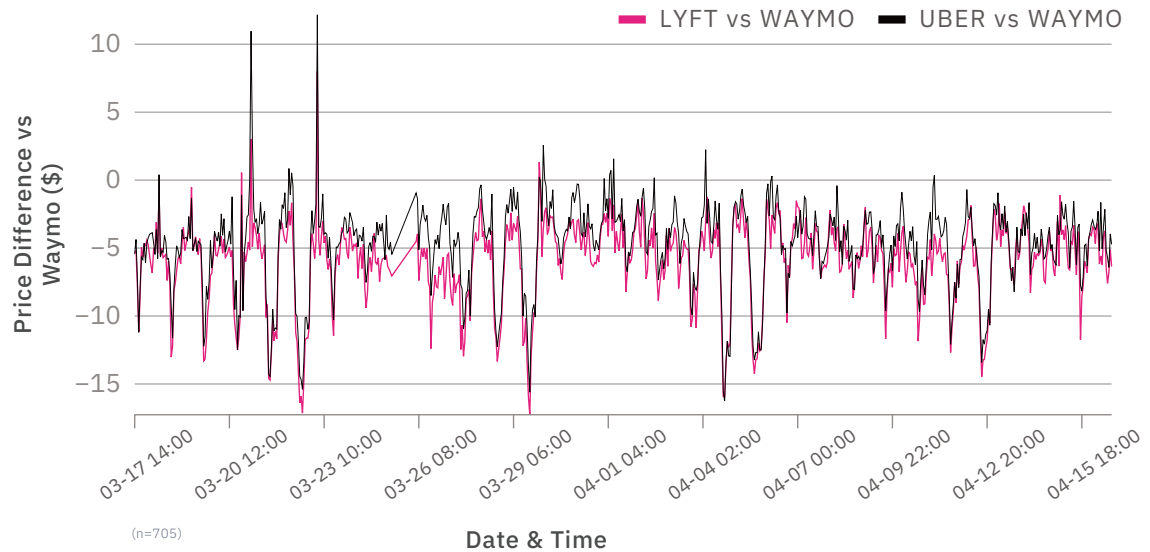
Waymo rides cost 41% more than Lyft and 31% more than Uber on average when comparing pricing at the same time and across the same routes. (Lyft is the cheapest rideshare option overall, with a mean average fare of \$14.44; median price for Lyft is the same as the mean price showing a consistency in being the most affordable option in the market.) Waymo also shows the highest price variability with a standard deviation of \$3.65, suggesting that its pricing algorithm is more influenced by factors like ETA, consumer demand, time of day etc.

Average Prices of Providers on the Same Routes



Waymo is Between
30 to 40% More Expensive
 Than Uber and Lyft On The Same Routes

Price Difference Between Waymo and Other Providers on Same Route



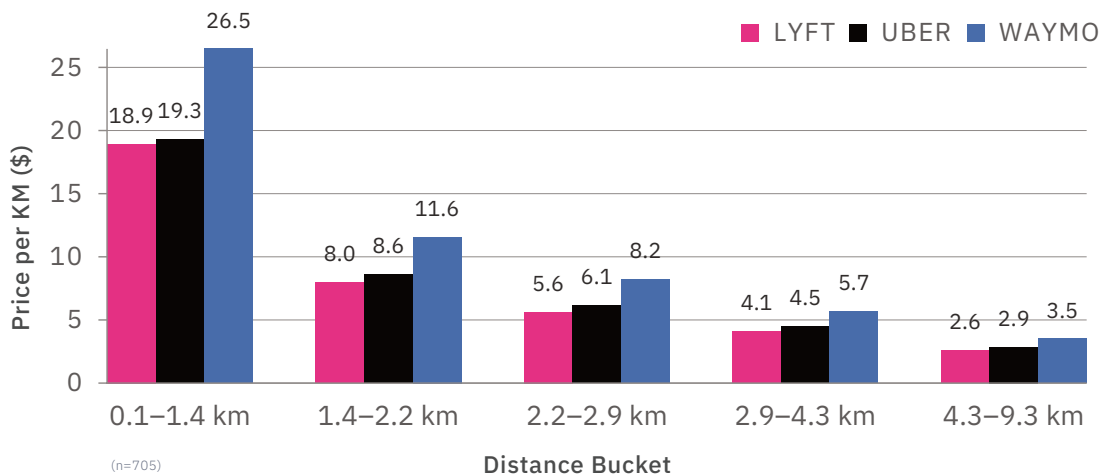
The average range between Waymo and other providers can spike **\$10 to \$15 more per ride**

Differences In Prices Between Waymo, Uber and Lyft in Price per Kilometer

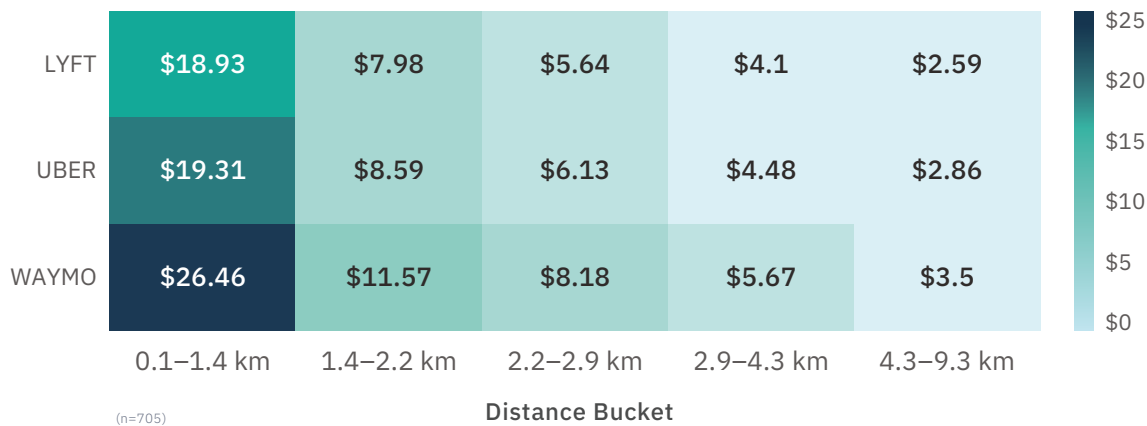
	Average Price	Standard Deviation	Median Price	Avg price/km
LYFT	\$14.44	\$1.92	\$14.22	\$7.99
UBER	\$15.58	\$2.22	\$15.36	\$8.36
WAYMO	\$20.43	\$3.65	\$19.52	\$11.22

Price Per Kilometer by Provider

Price per kilometer is the highest for the first kilometer for any ride, but significantly higher for Waymo. **Rideshare companies factor in driving time to reach a consumer and bake the price of the distance traveled into the trip; consumers going longer distances will pay less per kilometer.** The price difference for Waymo compared to Uber and Lyft is 41.48% and 31.12% higher and on average the price of the rides \$5.99 higher for Uber and \$4.85 more expensive for Lyft.

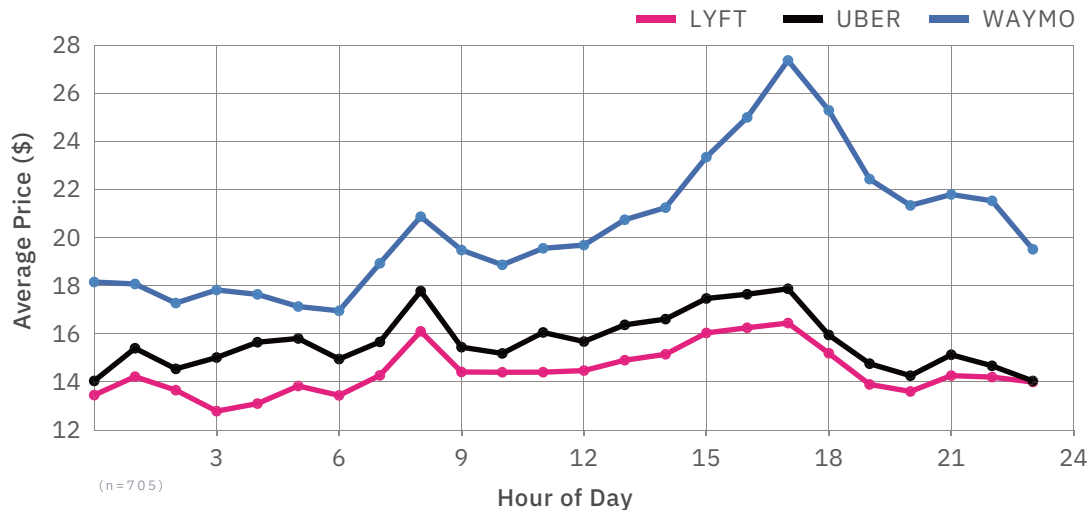


Average Price per Kilometer by Provider and Distance Bucket



Consumers pay **\$26.46** for the first km they ride in a Waymo

Hourly Prices by Provider



Waymo price variability is nearly **3X higher** than Lyft's

Average Prices: Lyft offers the lowest prices on average (\$14.44), followed by Uber (\$15.58) and Waymo (\$20.43).

Price Variability: Waymo shows the highest price variability per hour (std dev of \$2.77), which is almost three times that of Lyft (\$1). We can assume that the pricing algorithm of Waymo is heavily influenced by the number of cars available.

Peak Pricing: All services have peak pricing around 7–9 AM and 4–6 PM (rush hours), with Waymo showing the most extreme price increases. The price gap between traditional rideshare services (Lyft/Uber) and autonomous service (Waymo) widens significantly during peak hours. The early morning hours (3–4 AM) generally offer the lowest prices across all services.

Average Hourly Price Differences Between Rideshare Providers

LYFT VS. UBER

\$1.23

Lyft is \$1.23 cheaper than Uber on average

LYFT VS. WAYMO

\$5.98

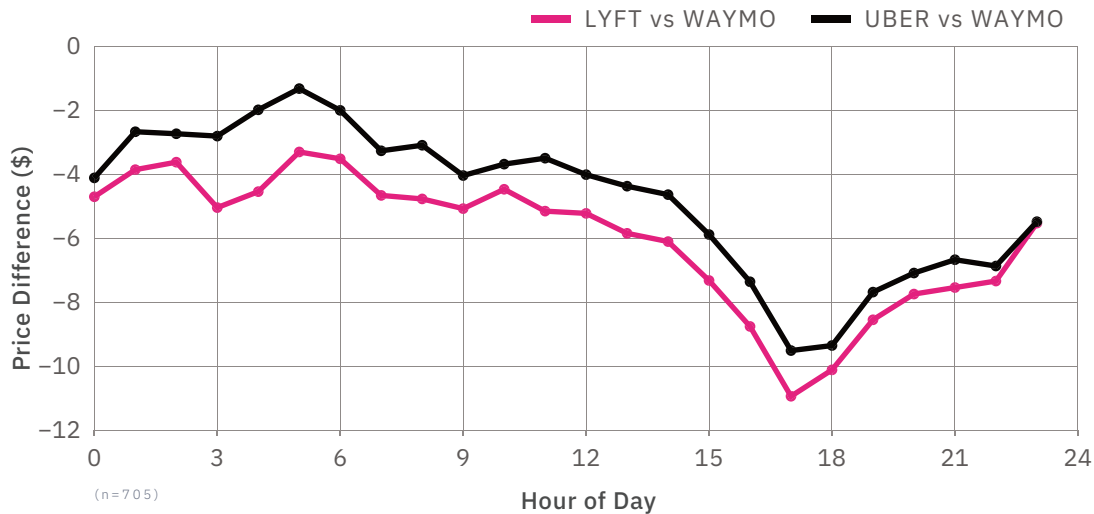
Lyft is \$5.98 cheaper than Waymo on average

UBER VS. WAYMO

\$4.75

Uber is \$4.75 cheaper than Waymo on average

Hourly Price Differences Between Providers



Consistently Lower Prices: Both Lyft and Uber are cheaper on average than Waymo across all 24 hours of the day, with no exceptions.

Largest Price Gaps During Peak Hours: The price difference is most dramatic during evening rush hour (5–6 PM), when Waymo is approximately \$11 more expensive than Lyft and nearly \$9.5 more expensive than Uber.

Minimum Price Difference: The smallest price gap occurs at 5 AM, when Uber is only \$1.32 cheaper than Waymo.

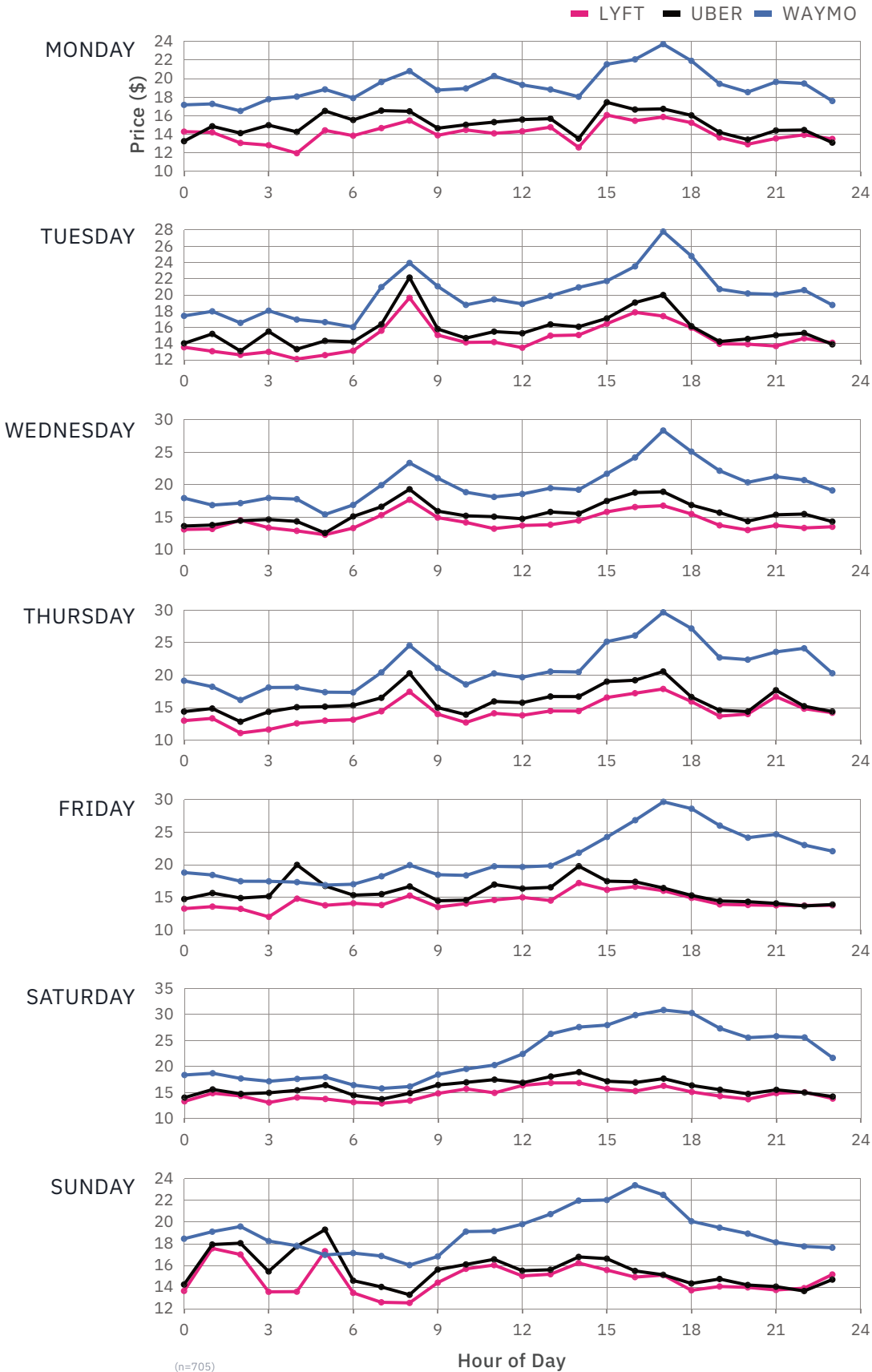
Early Morning Pricing: Between 12–6 AM, Waymo maintains a moderate premium of about \$3–5 over competitors.

Price Pattern Alignment: All three services follow similar price fluctuation patterns throughout the day, with prices rising during morning and evening commute hours.

Evening Decline: After the evening peak (6 PM), the price gap gradually narrows as all services reduce their prices toward late night.

At rush hour, Lyft is nearly **\$11 cheaper** than Waymo

Day by Day Comparison Of Hourly Prices



Key Insights on Day by Day Comparisons for Waymo

Best Times for Waymo Value:

- Early morning hours (3–5 AM) show Waymo's lowest prices (around \$16–17) (Especially on Fridays and Sundays).
- The price gap between Waymo and competitors is smallest during these early hours.

Worst Times for Waymo Value:

- Friday and Saturday evenings show the highest price premium over competitors.
- Any time between 4–7 PM typically shows the largest price gap.

Competitive Positioning:

- Waymo's pricing algorithm appears more sensitive to peak demand than competitors.
- The consistent premium suggests a business strategy focused on higher margins rather than volume.
- The gap between Waymo and competitors widens during high-demand periods, suggesting different approaches to surge pricing.

SECTION 2

ETA

ETA is the second most important factor in rideshare selection for consumers after price. Waymo, due to fewer cars, can have significantly longer ETAs, as well as higher prices in peak hours, showing that consumers who do choose to use a Waymo at these times are driven by a strong preference for autonomous vehicles.

Key Takeaways in ETA Analysis

Average Wait Times (Mean)

- Lyft's range: 144.28 to 785.45 seconds (2.40 to 13.09 minutes)
- Waymo has the widest range: 75.00 to 757.50 seconds (1.25 to 12.63 minutes)
- Uber offers the shortest average ETA at 189.25 seconds (3.15 minutes)

ETA Range

- Lyft has the widest range: 144.28 to 785.45 seconds (2.40 to 13.09 minutes)
- Waymo's range is 75.00 to 757.50 seconds (1.25 to 12.63 minutes)
- Uber has the narrowest range: 90.00 to 394.00 seconds (1.5 to 6.57 minutes)

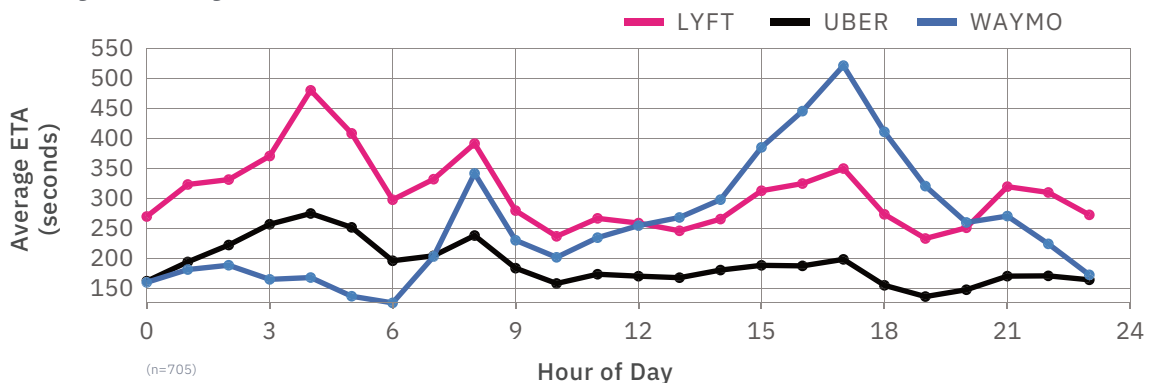
ETA Consistency (Standard Deviation)

- Waymo shows the highest variability with std = 137.23 seconds
- Lyft follows with std = 104.3 seconds
- Uber has the most consistent ETAs with std = 51.2 seconds

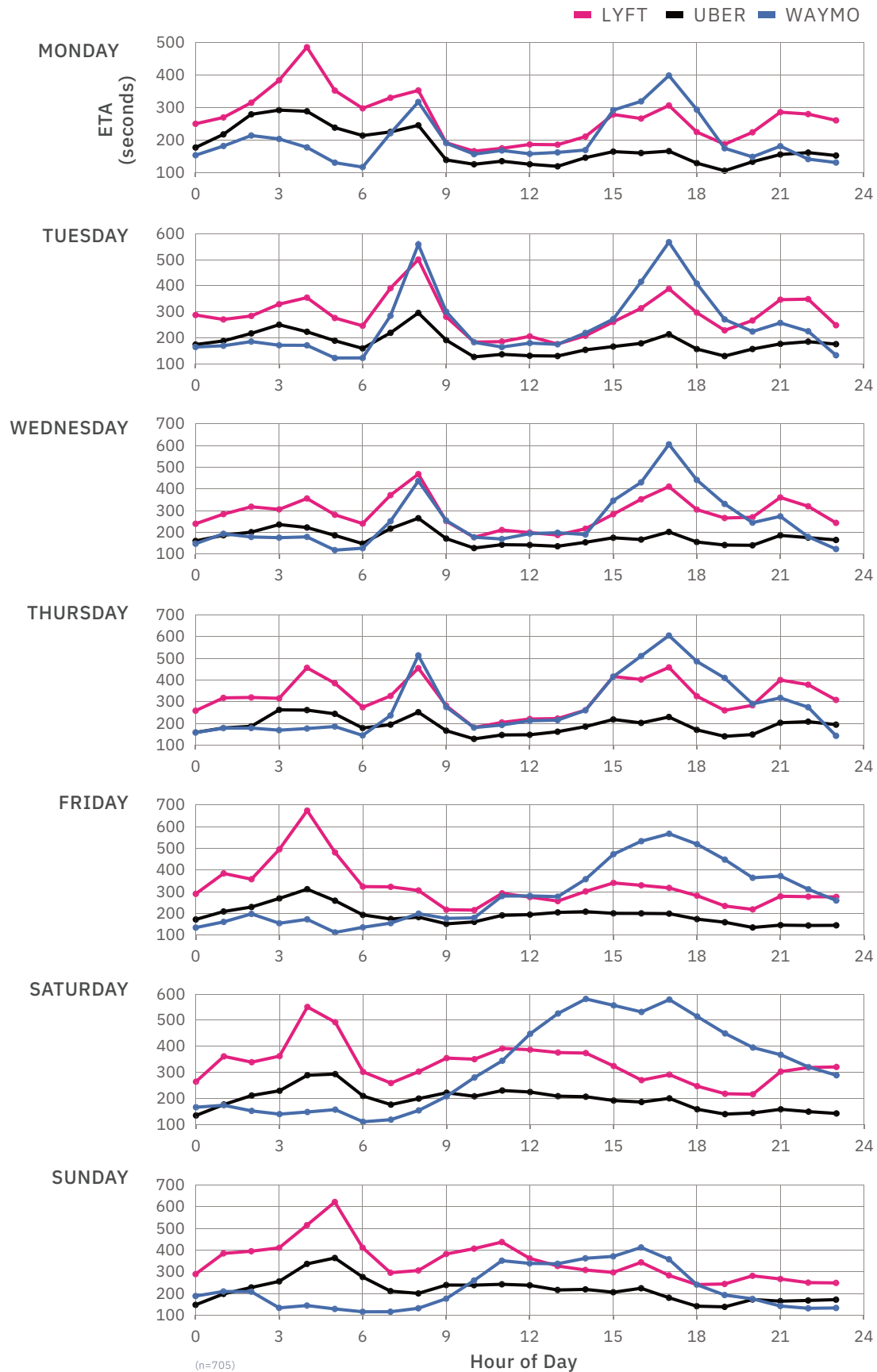
Median vs Mean

- All three services have a median (50%) lower than their mean, indicating right-skewed distributions with occasional very long wait times.
- Lyft: median 286.83 seconds (4.78 minutes) vs mean 308.13 seconds (5.14 minutes)
- Uber: median 182.01 seconds (3.03 minutes) vs mean 189.25 seconds (3.15 minutes)
- Waymo: median 203.08 seconds (3.38 minutes) vs mean 257.08 seconds (4.28 mins)

Hourly ETA by Provider



Hourly ETA By Day of Week Across Providers

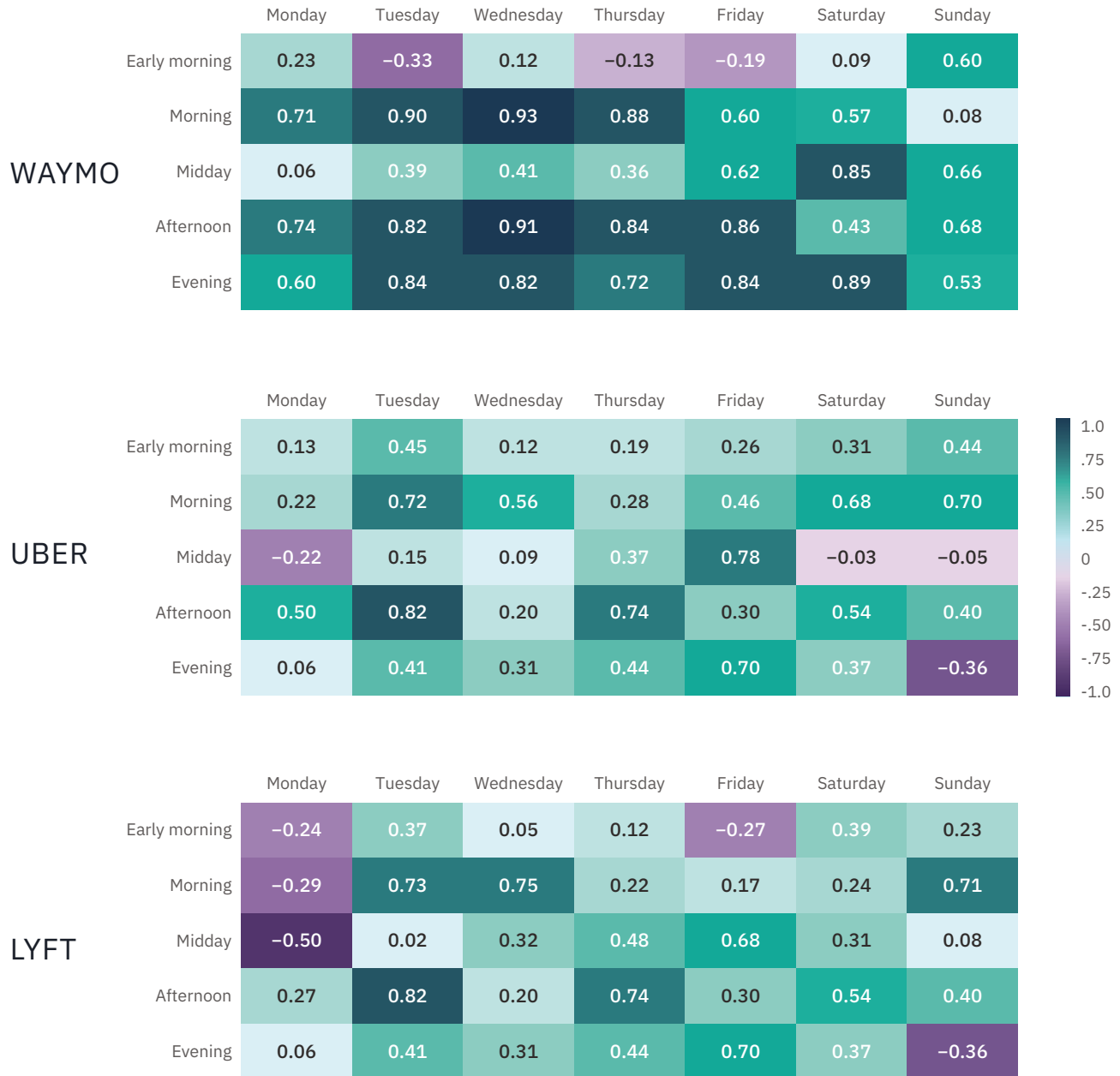


Key Insights When Comparing Price and ETA

- **Waymo's pricing is primarily supply-driven**, with ETA (vehicle availability and distance) being the main factor explaining price adjustments. Correlations are strong and positive across most time periods, indicating a straightforward, supply-sensitive pricing model.
- **In peak hours, there is almost always a positive correlation between ETA and price**, meaning the longer you have to wait, the more you have to pay. This is due to the cost of sending a car to a consumer's pick-up address.
- The strongest **positive correlations appear during high-demand periods like Friday and Saturday evenings (6 PM–midnight)**, indicating times when both price and wait times increase together.
- **Late-night hours (after 10 PM) show varied correlation** patterns across different days, potentially reflecting Waymo's adaptations to different nighttime demand patterns. **Safety may be a concern at night as news reports suggest** the cars may have more trouble in low-light environments.

Correlation Between Price and ETA by Time Period* and Day of the Week

*Time periods are defined on p.25 of Methodology



Positive correlations indicate that the longer the wait time, the higher the price. Negative correlations indicate that the longer the wait time, the lower the price. In addition, the lower correlation (in lighter colors) suggest that Uber and Lyft base pricing on a wider range of factors. In contrast, Waymo's pricing shows a simpler pattern - prices are primarily set based on ETA.

SECTION 3

Price Elasticity & ETA

Waymo's pricing, while higher than its rivals, shows a consistent pattern that can allow consumers to plan for whether they choose to use the service or not. Waymo consistently shows the highest R-squared values across all time periods, indicating that its pricing model has the strongest correlation with ETA. R-squared is a statistical measure indicating what proportion of variance a dependent variable (price) can be explained by other independent variables in the model which in this case is ETA. The higher the r-squared value, the more likely the independent variable (ETA) influences the dependent variable, time.

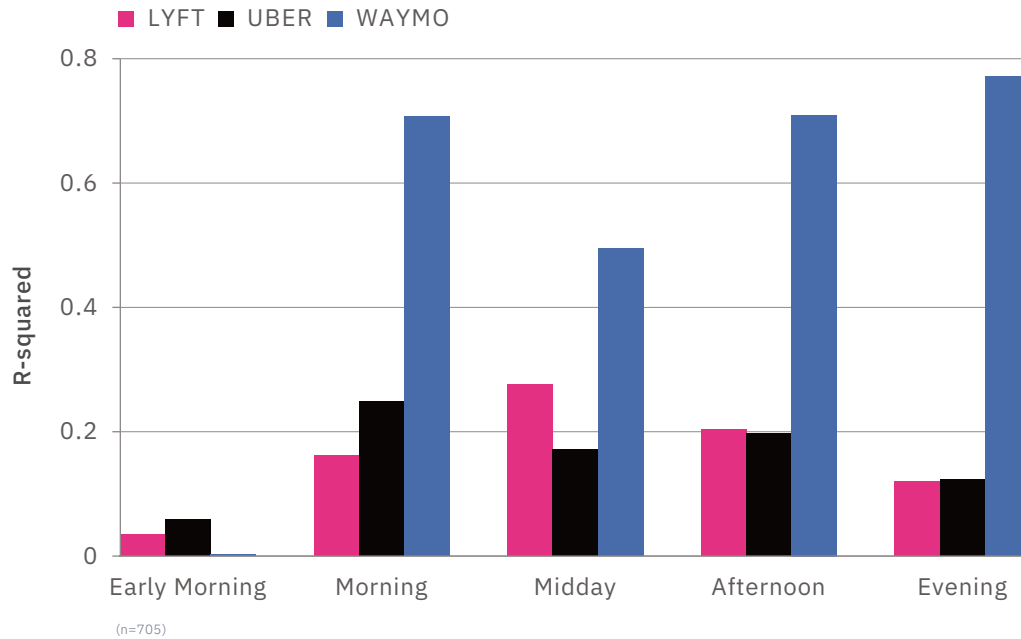
Time period variations are significant, with early mornings showing the lowest R-squared values for all three companies. One reason may be that ETA is not as significant due to Waymo maintaining high R-squared (0.71-0.76) during the afternoons and evenings. This means that 71% to 76% of the variance in price could be solely explained by ETA, while approximately 30% of the variance is due to other unknown factors.

Price elasticity patterns across the rideshare companies show different pricing strategies.

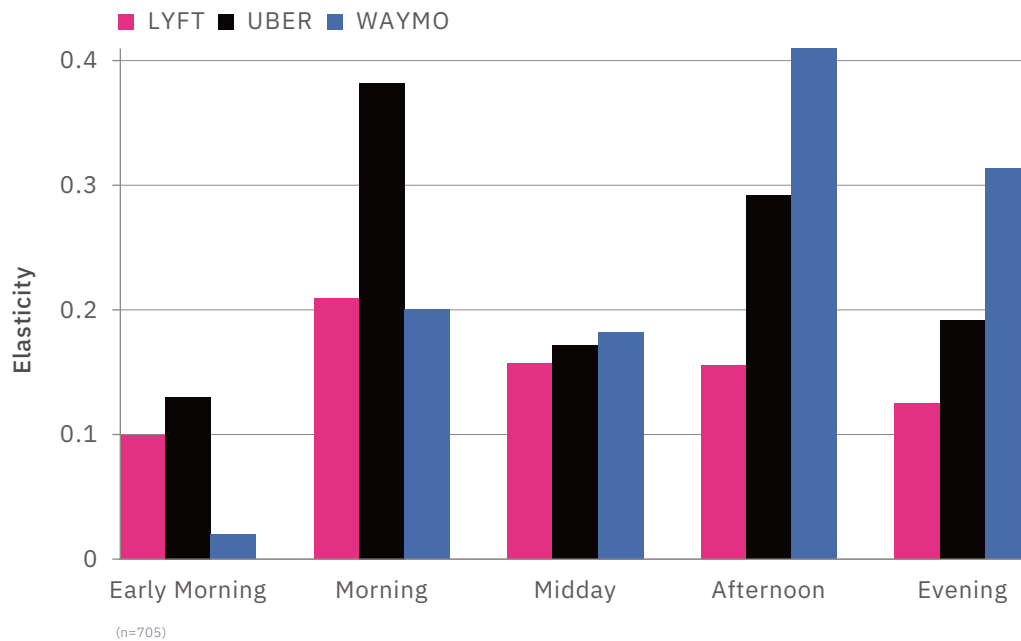
- Uber shows high elasticity (0.38) in the Morning (6 AM–10 AM), meaning prices are more responsive to ETA changes.
- Waymo shows highest elasticity (0.41) in the Afternoon (2 PM–6 PM) So for every 10% increase in ETA, the consumer would have to pay 4.1% more.
- Lyft maintains the most consistent elasticity across time periods (0.10–0.21).

R-squared by Service and Time Period*

*Time periods are defined on p.25 of Methodology



Price Elasticity to ETA by Service and Time Period



Waymo shows highest elasticity (0.41) in the afternoon
(so for every 10% increase in ETA, the consumer would have to pay 4.1% more)

SECTION 4

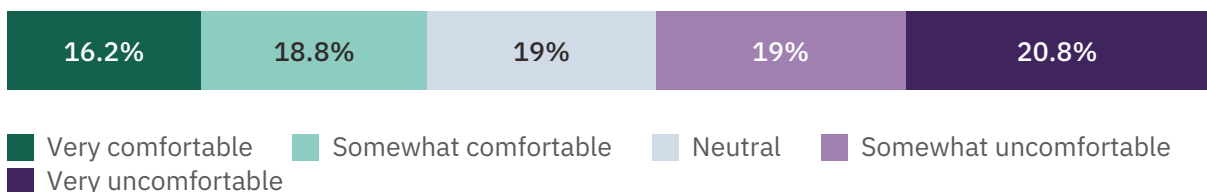
Survey Data: Attitudes on Autonomous Vehicles

Age, gender and state of origin significantly impact attitudes towards autonomous vehicles and rideshare. In Obi's survey of riders in California (Los Angeles and San Francisco) and Arizona (Phoenix) where Waymo operates, we found that men are more trusting of autonomous vehicles (AV) than women, with 48% of men versus 34% of women saying they would trust Waymo to transport their children. 65% of men would trust Waymo to transport an elderly relative compared to 44.5% of women. 38.5% of men vs 16% of women surveyed have already traveled in a Waymo. In the 60+ age group, 1 out of 2 individuals said they would "never" use an AV.

Enthusiasm for Waymo is high across age groups but particularly among those 45–59 years of age. Middle-aged and older adults also valued the quality of driverless cars. Younger adults, 18–29 years of age, didn't express strong preferences for AVs, while adults over sixty reflected more worries about technology. **For users that had taken a Waymo ride, a whopping 70% said they preferred a driverless car to a traditional rideshare or taxi with a driver.** Safety, privacy and job loss for drivers topped the list of concerns regarding AVs. Safety concerns dropped by 8% to 15% for individuals who have ridden a Waymo (depending on age group), but overall remains above 50% for even this group of early adopters. Addressing consumer safety concerns will be a key hurdle for AVs to overcome.

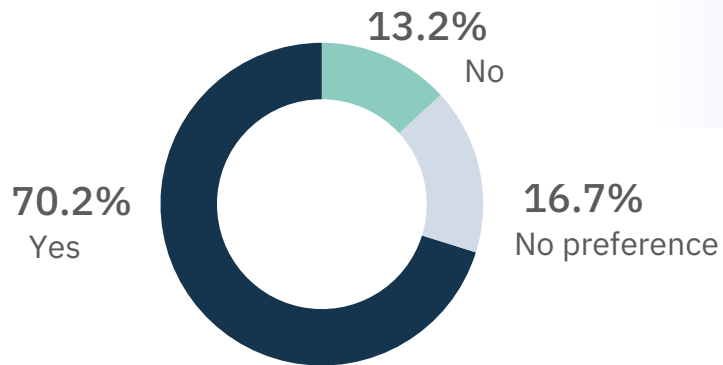
How comfortable would you feel riding in an autonomous/driverless rideshare like Waymo?

Answered: 457



Did you prefer the experience of Waymo vs a regular rideshare with a driver?

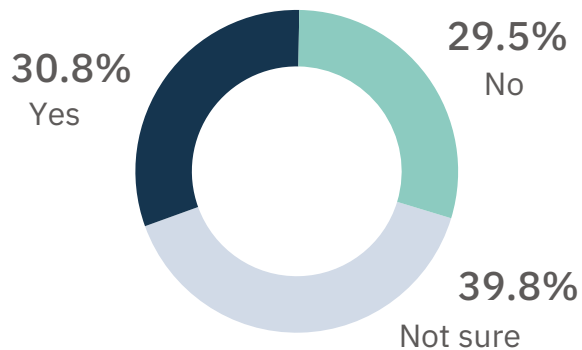
Answered: 114



70%
of users prefer Waymo
to a regular rideshare

Do you believe autonomous rideshares like Waymo will be safer than human-driven rideshares in the next 5 years?

Answered: 455



Only **31%**
of riders **believe that**
Waymo will be safer
than human drivers in
the next 5 years.

Would you pay more for an autonomous Waymo taxi?

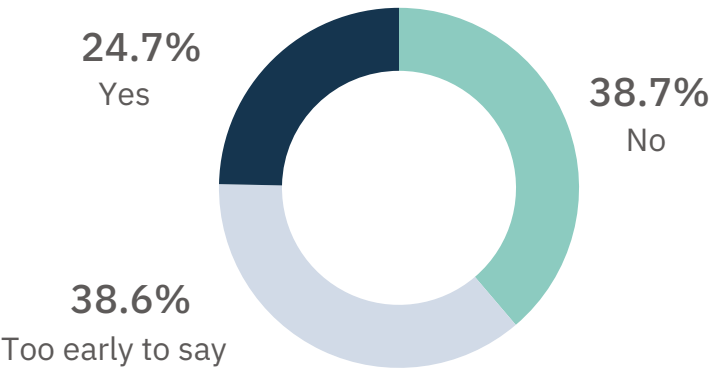
Answered: 455



No - I would pay the same or less.
 No - I wouldn't take one at all.
 Yes - up to \$10
 Yes - But only less than \$5
 Yes - up to \$5

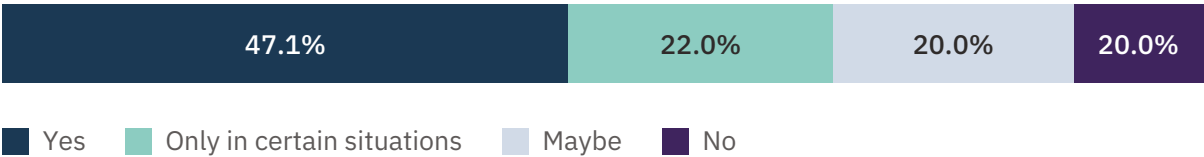
Do you see Waymo/driverless cars becoming your main rideshare in the near future?

Answered: 454



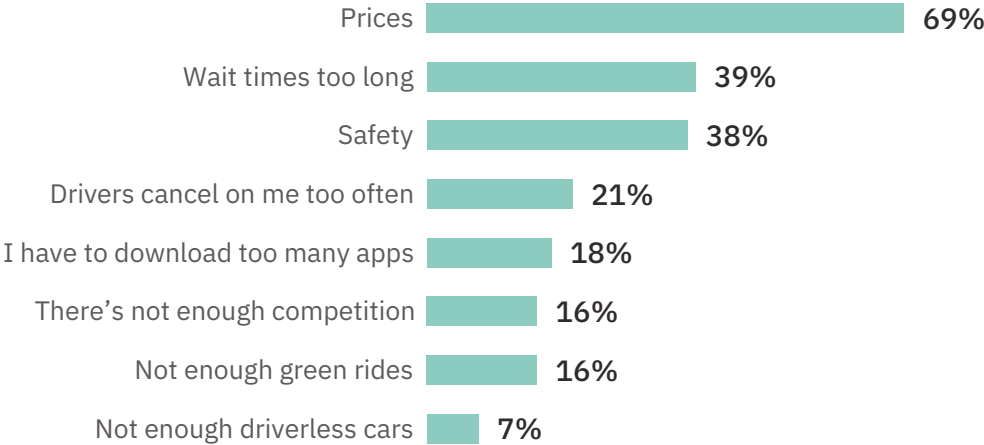
Do you think driverless rideshares like Waymo should have a remote human operator monitoring the ride?

Answered: 455



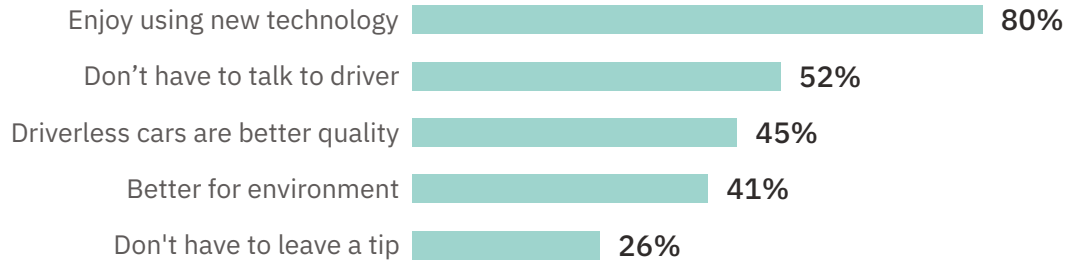
What's your biggest issue(s) with rideshares in 2025?

Answered: 428



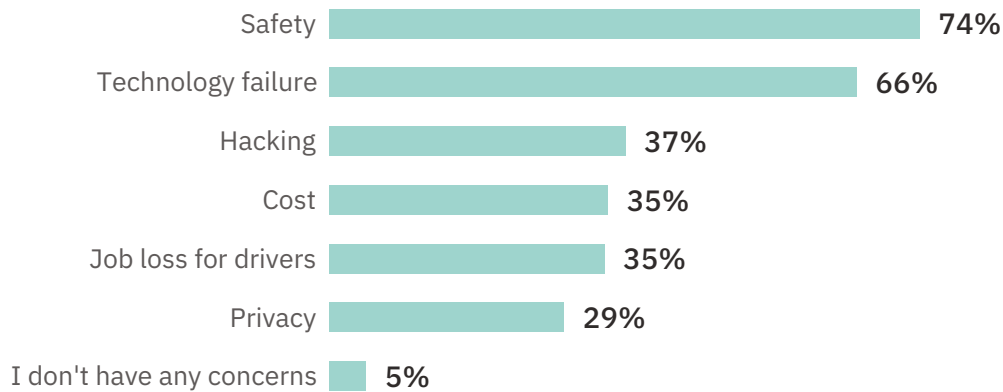
Why did you prefer the Waymo driverless car? (select all that apply)

Answered: 455



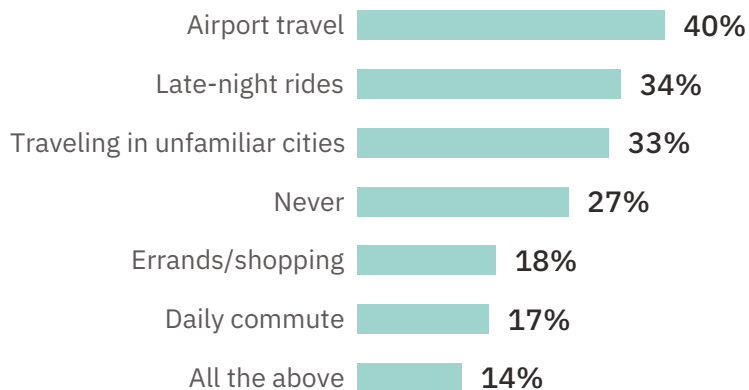
What are your biggest concerns about autonomous rideshares like Waymo? (select all that apply)

Answered: 455



What situations would you consider using a Waymo driverless rideshare for? (select all that apply)

Answered: 455



Would you trust a Waymo autonomous/driverless car to pick up your child?

Answered: 428



Would you trust a Waymo autonomous/driverless car to take you to the hospital in an emergency?

Answered: 424

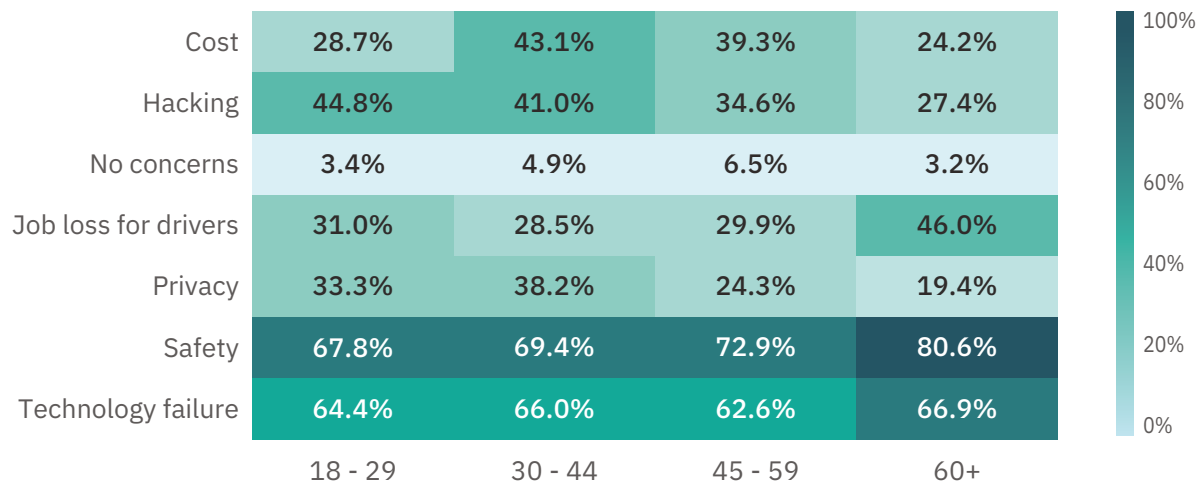


Would you trust a Waymo autonomous/driverless car to transport elderly friends/relatives?

Answered: 427

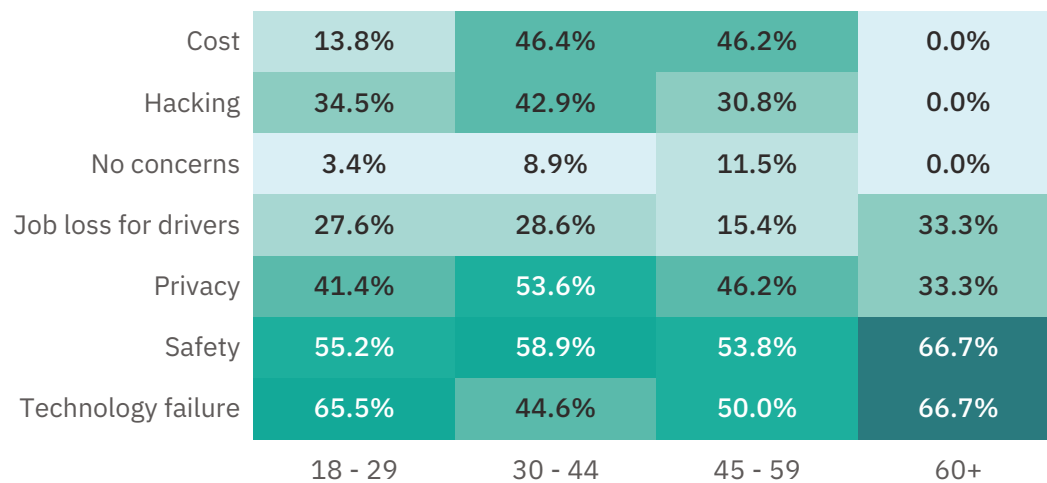


Concerns By Age Regarding Autonomous Vehicles



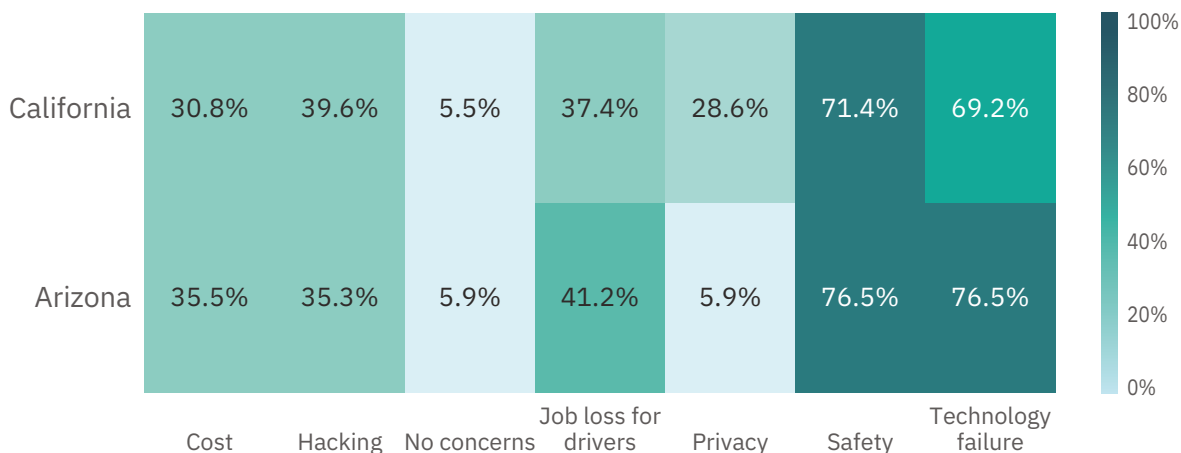
Over **31%**
of Young and Older Riders Share
Fears of Technology Failures

Concerns By Age Regarding Autonomous Vehicles (Respondents Who Have Taken Waymo)



Privacy concerns jumped by 15% among individuals
ages 30-44 who have taken a Waymo.

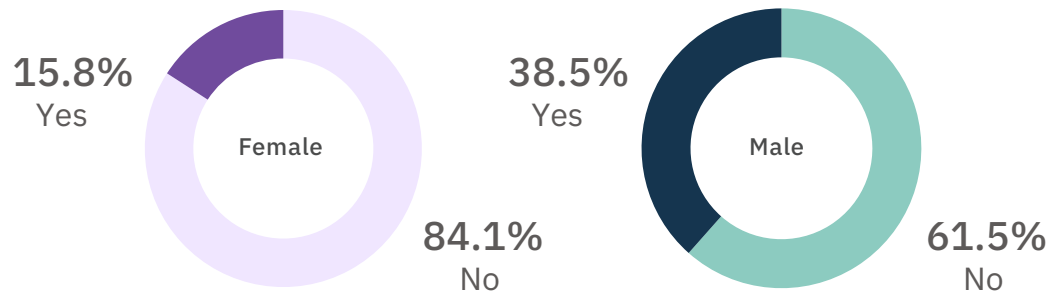
Concerns Regarding Autonomous Vehicles By State



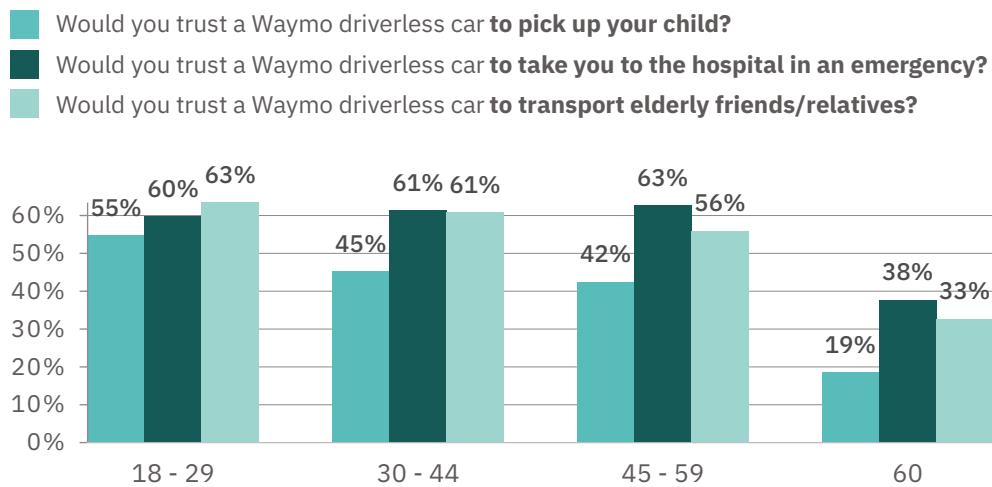
Key Insights

- Arizona residents show higher concern about technology failure (74%) compared to Californians (64%).
- Privacy concerns are 50% higher in California (31%) than in Arizona (20%).
- Job loss for drivers is similar between states (31–34%), showing universal economic concern.
- The group that used Waymo is less concerned about safety and more about cost (only in California) and privacy.
- Residents of California who have ridden Waymo are more concerned about the cost (38%) compared to people who haven't ridden in a Waymo (31%).
- People who have used Waymo were more concerned about privacy than people for who have not taken a Waymo; 51% of Californians were concerned about privacy vs 12% of Arizona residents.

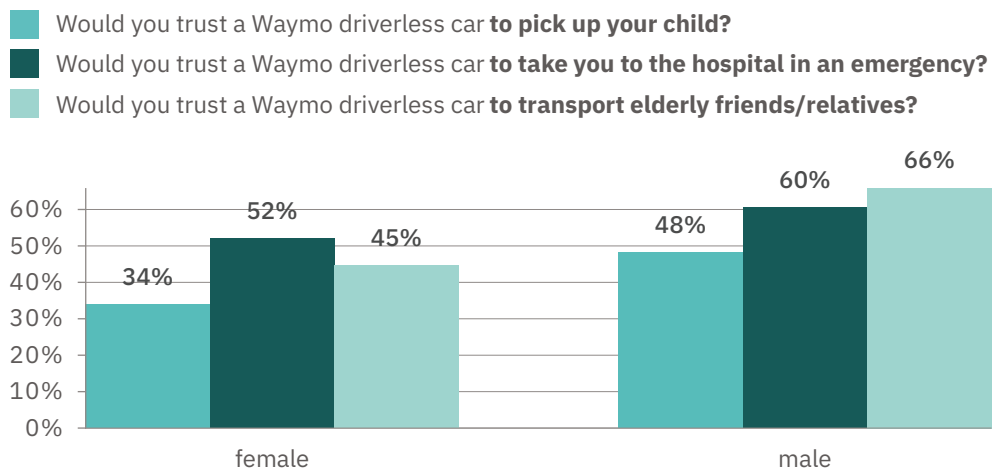
Have You Ridden A Waymo? (Gender Breakdown)



Trust Factors for Waymo By Age



Trust Factors for Waymo By Gender



Methodology

Data Sources and Coverage

This analysis uses one month of rideshare data (March 25, 2025 to April 25, 2025) for standard ride types (Waymo, Lyft Standard, UberX) across selected San Francisco streets. Data were sourced from a local PostgreSQL database, tracking hourly request records, pricing, and ETAs. All timestamps are standardized to the America/Los_Angeles timezone to ensure temporal consistency.

To complement the analysis of rideshare mobility data, Obi conducted the Obi Autonomous Ride Survey 2025 via surveymonkey. The survey was distributed to 507 consumers across the United States, with a focus on regions where autonomous vehicles are currently available, particularly California and the Phoenix metropolitan area.

Definition of Terms:

Service provider: Rideshare company, i.e., Waymo, Lyft, or Uber.

Service type: The standard offering of each provider (UberX, Lyft Standard, or Waymo ride).

Ride search: An artificially user-generated request for a price and ETA for a specific pickup and drop-off.

Offer: A specific quoted price and ETA provided in response to a search.

Variables:

Key fields used in our analysis (and thus defined in the psql database)

- **search_hour** - time of the offer (hourly granularity in local time)
- **service_provider**
- **eta** - Estimated arrival time (ETA) in seconds
- **price** - Price corresponding to an offer in dollars
- **pickup_lat, pickup_lng, destination_lat, destination_lng** - Pickup and destination coordinates
- **Distance** - created based on pickup and destination coordinates using Haversine formula
- **Time of the day:**
 - Created based on **search_hour** with bucketing defined as:
 - Early morning: 00:00–04:00
 - Morning: 04:00–09:00
 - Midday: 09:00–15:00
 - Afternoon: 15:00–18:00
 - Evening: 18:00–24:00

All results are limited to rides along the same road corridors (each ride search was made within the same region - San Francisco city) where all three service providers operated concurrently.

Data Filtering and Aggregation

A total of 88,998 individual offer records were initially extracted, representing every instance where any provider (Waymo, Lyft Standard, UberX) quoted a price and ETA for a ride search within the covered time frame and region. However, not all offers were suitable for direct comparison. To ensure a fair, apples-to-apples analysis, we identified only those ride searches where all three providers simultaneously returned a valid offer for the same origin and destination, within the same minute.

This filtering was carried out via SQL, as follows:

- **Grouping:** Offer records were grouped by search event (using search_id), with only those events included where all three providers issued a response.
- **Aggregation:** For each qualifying search event, results were further aggregated to the hour (local time), yielding one row per provider per search hour.
- **Final Dataset:** The result was 705 unique search hours, each containing one record per provider, for a total of 2,115 comparison observations (705 x 3), which served as the final analytical dataset.

Analytical methods:

Descriptive statistics were calculated to summarize the distributions of average price and estimated time of arrival (ETA) for each service provider across all hours and within custom time-of-day buckets.

To assess the relationship between ride price and ETA, Pearson correlation coefficients were computed both overall and within each time bucket for each provider. Where relevant, the coefficient of determination (R-squared) was also reported.

Survey data was first processed by standardizing categorical responses to ensure consistency. Responses from individuals under 18 years old and from those not residing in California or Arizona were excluded from the analysis. Descriptive statistics were then computed on the cleaned survey data to examine key variables, including respondent demographics and attitudes towards autonomous vehicles.

Data Processing and Tools

Data extraction, storage and aggregation were performed via SQL queries from the PostgreSQL database hosted on local server. Analysis and visualization were conducted in Python (Jupyter notebooks), using the pandas and numpy libraries for data manipulation, and seaborn/matplotlib for plotting. No additional data cleaning was necessary, as the supplied tables were complete and standardized.

Limitations

The scope is restricted to a one-month period, standard ride types, and selected San Francisco roads. Pricing and ETA behavior is potentially influenced by dynamic provider algorithms, demand, and car availability, and may not generalize beyond these settings.

Ethical Considerations

No personal or identifying data was processed; all analysis utilized only aggregated records.



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